MISSOURI DIVISION OF TOURISM

MISSOURI APRIL TRAVEL BAROMETER
(DATA AVAILABLE AS OF 05/14/2021)

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Missouri Travel Barometer

The Missouri Division of Tourism research team analyzes a range of tourism research metrics in order to provide the Missouri travel industry and the MDT staff with a monthly *Missouri Travel Barometer*.
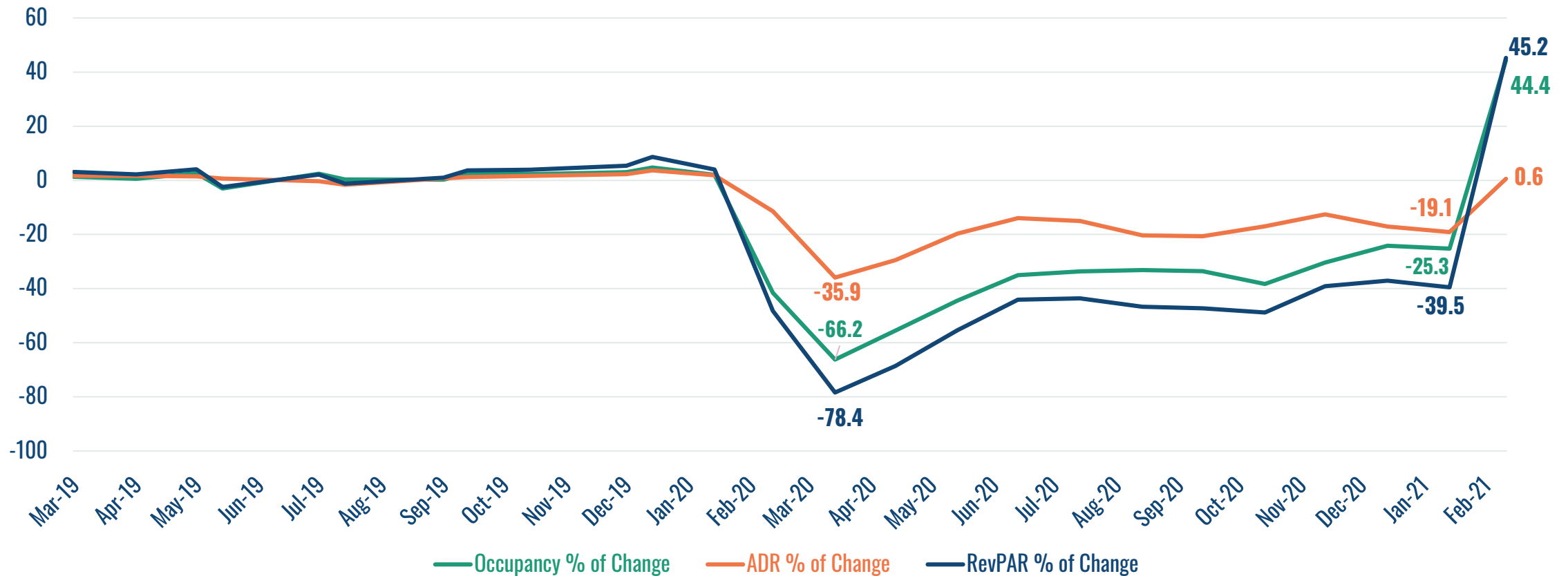
The barometer shows key travel indicators that illustrate various measurements affecting Missouri's tourism industry and are indicators of its health.

Missouri Travel Barometer

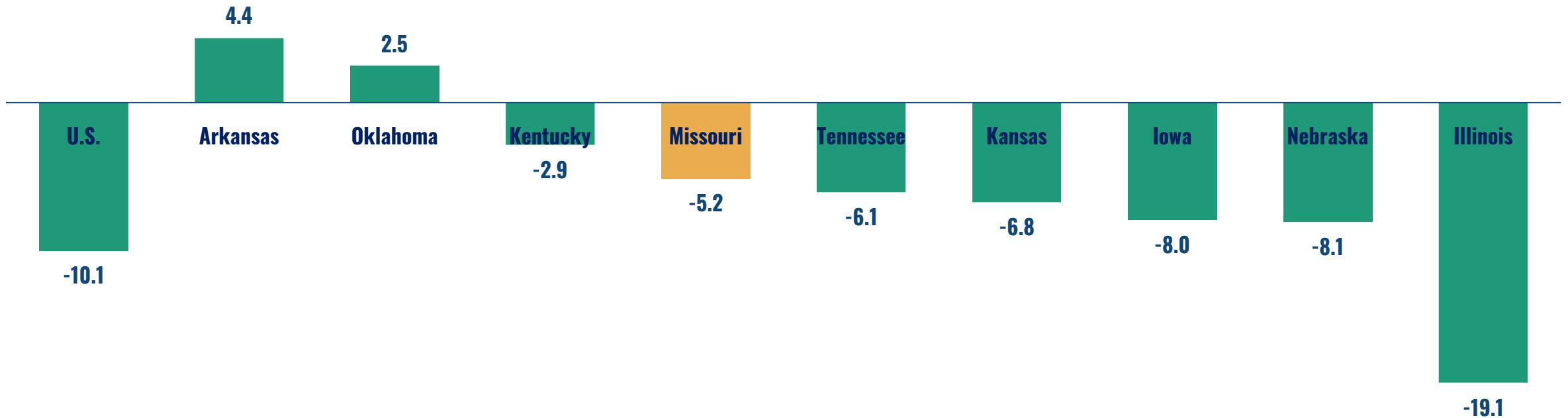The effect of Covid-19 first hit the week ending 2/29/2020

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STR Monthly Lodging Trends Percentage of Change

- Occupancy % of Change
- ADR % of Change
- RevPAR % of Change

45.2
44.4
0.6
-19.1
-25.3
-39.5
-35.9
-66.2
-78.4

Missouri Travel Barometer

STR Occupancy Percentage of Change
January - March 2021 vs January - March 2020
Comparison with Neighboring States

State	% Change
U.S.	-10.1
Arkansas	4.4
Oklahoma	2.5
Kentucky	-2.9
Missouri	-5.2
Tennessee	-6.1
Kansas	-6.8
Iowa	-8.0
Nebraska	-8.1
Illinois	-19.1

Missouri Travel Barometer

STR Lodging Trends – Week Ended May 1, 2021

OCCUPANCY was up
113.1%
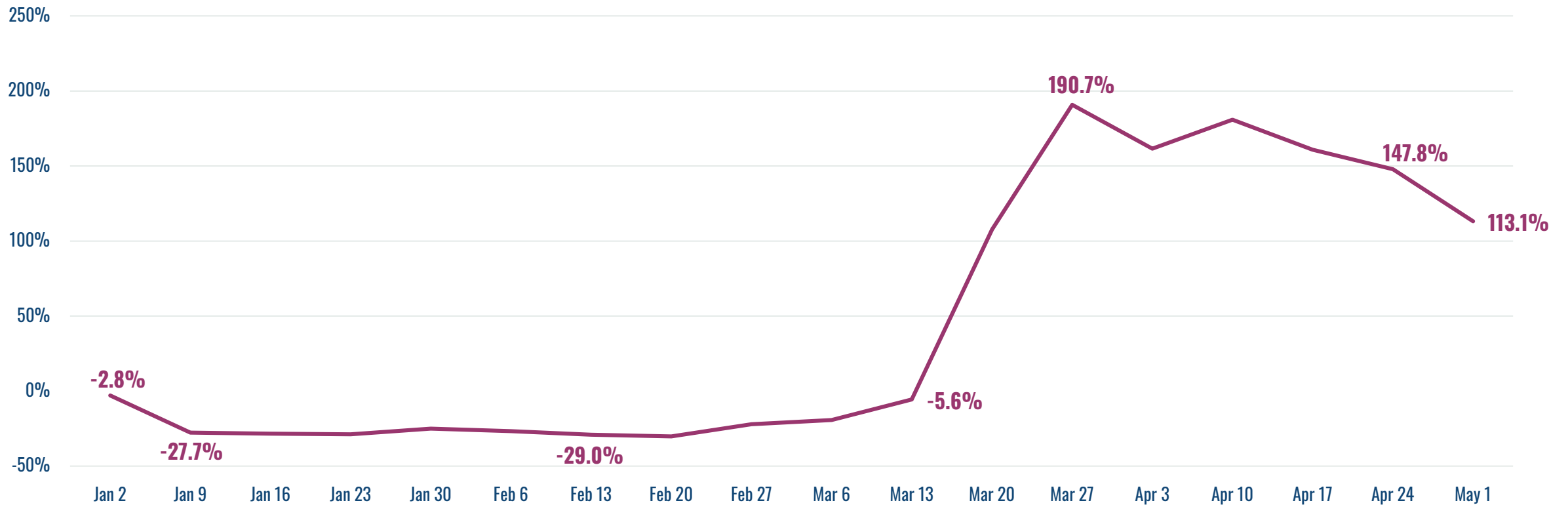as compared to the same week in 2020

STATEWIDE DEMAND
INCREASED
132.1%

ADR
(Average Daily Room Rate)
INCREASED
38.0%

RevPAR
(Revenue per Available Room)
INCREASED
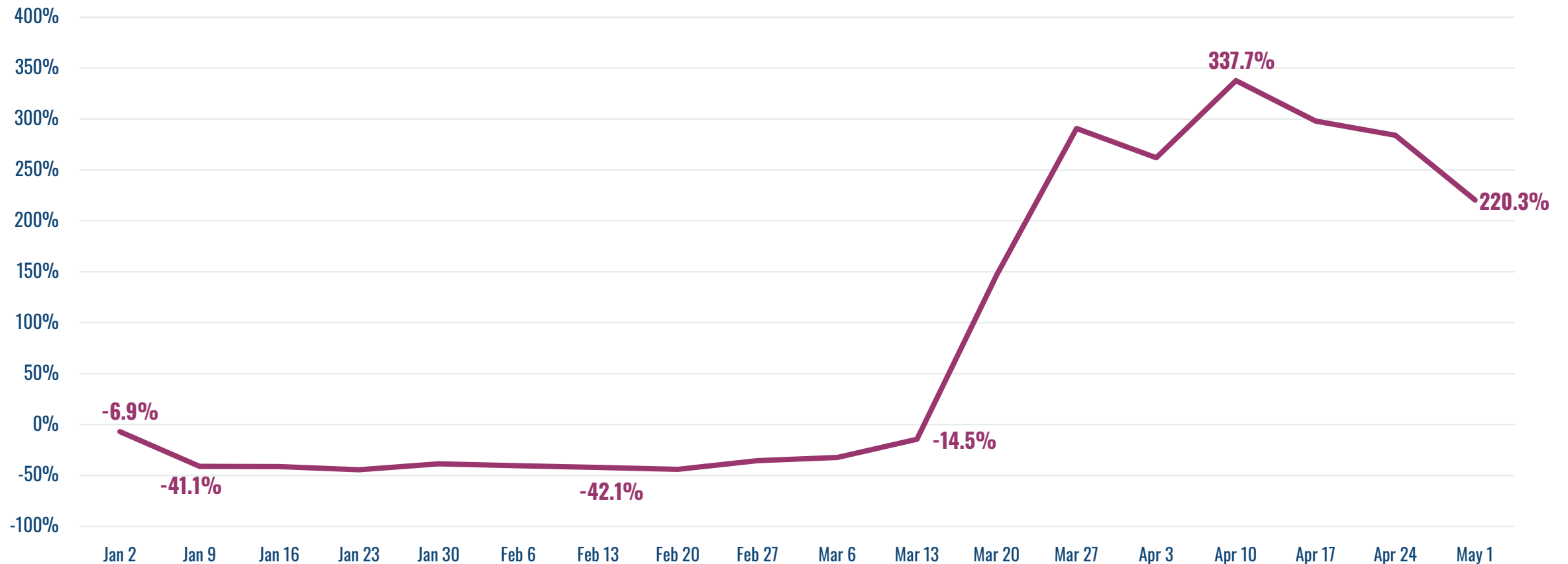**194.2%**

Missouri Travel Barometer

STR Weekly Lodging Trends
Occupancy % of Change from Prior Year

Missouri Travel Barometer

STR Weekly Missouri Lodging Revenue % of Change from Prior Year

Missouri Travel Barometer

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AirDNA Short-Term Rental Trends for Hotel Comparable Rooms

March 2021 Compared to 2020

OCCUPANCY was up **20.2%** as compared to the time period in 2020

STATEWIDE DEMAND INCREASED 49.3%

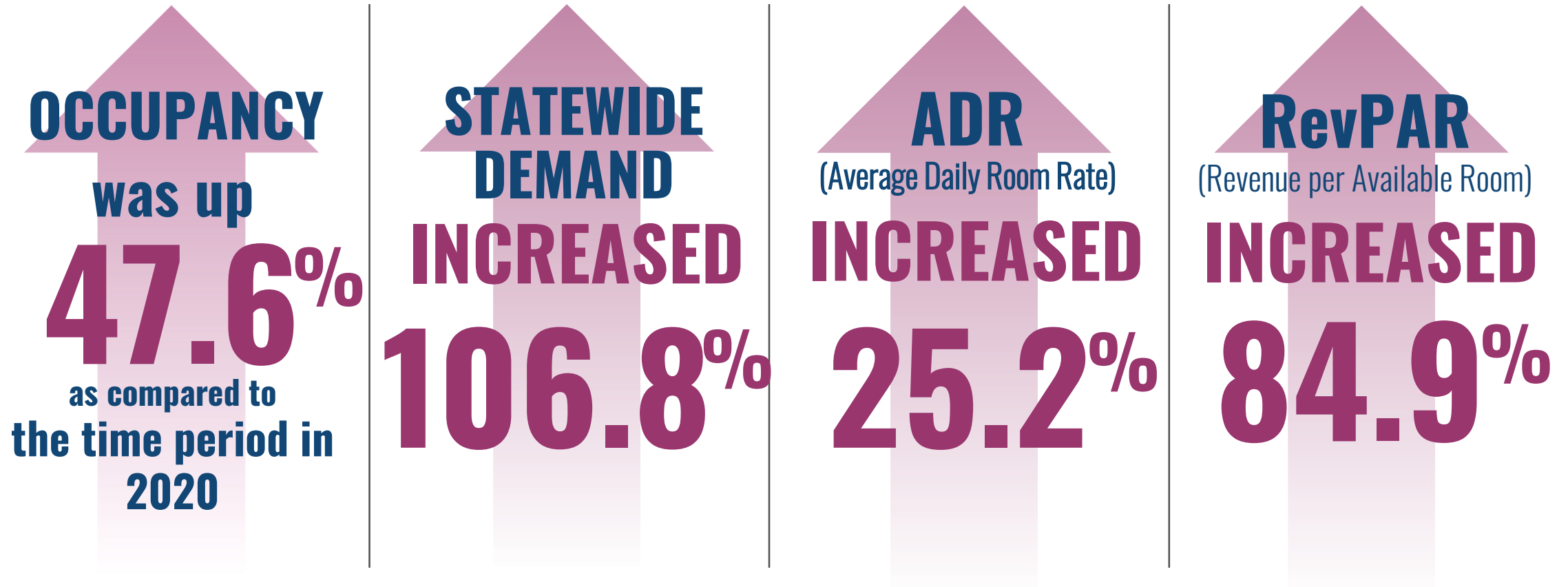**ADR** (Average Daily Room Rate) **INCREASED 24.9%**

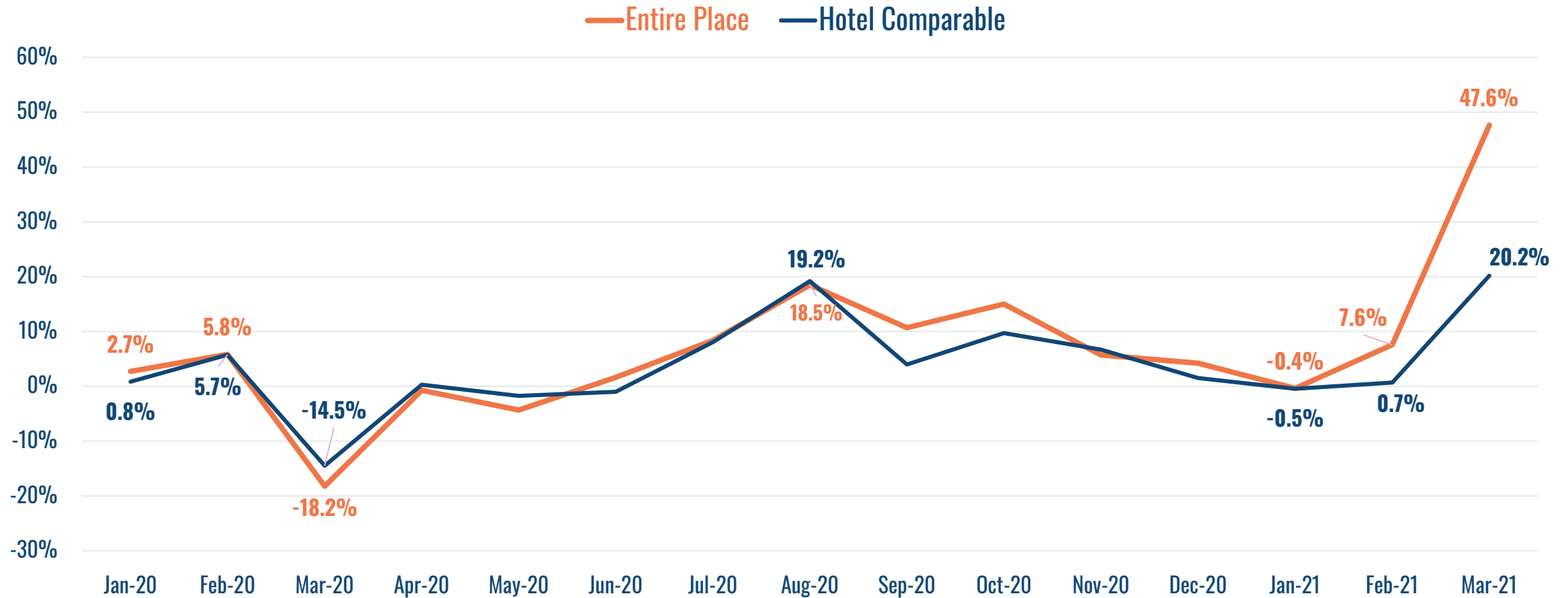**RevPAR** (Revenue per Available Room) **INCREASED 50.1%**

AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

The effect of Covid-19 first hit the week ending 2/29/2020

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AirDNA Short-Term Rentals ADR % of Change from Prior Year

— Entire Place   — Hotel Comparable
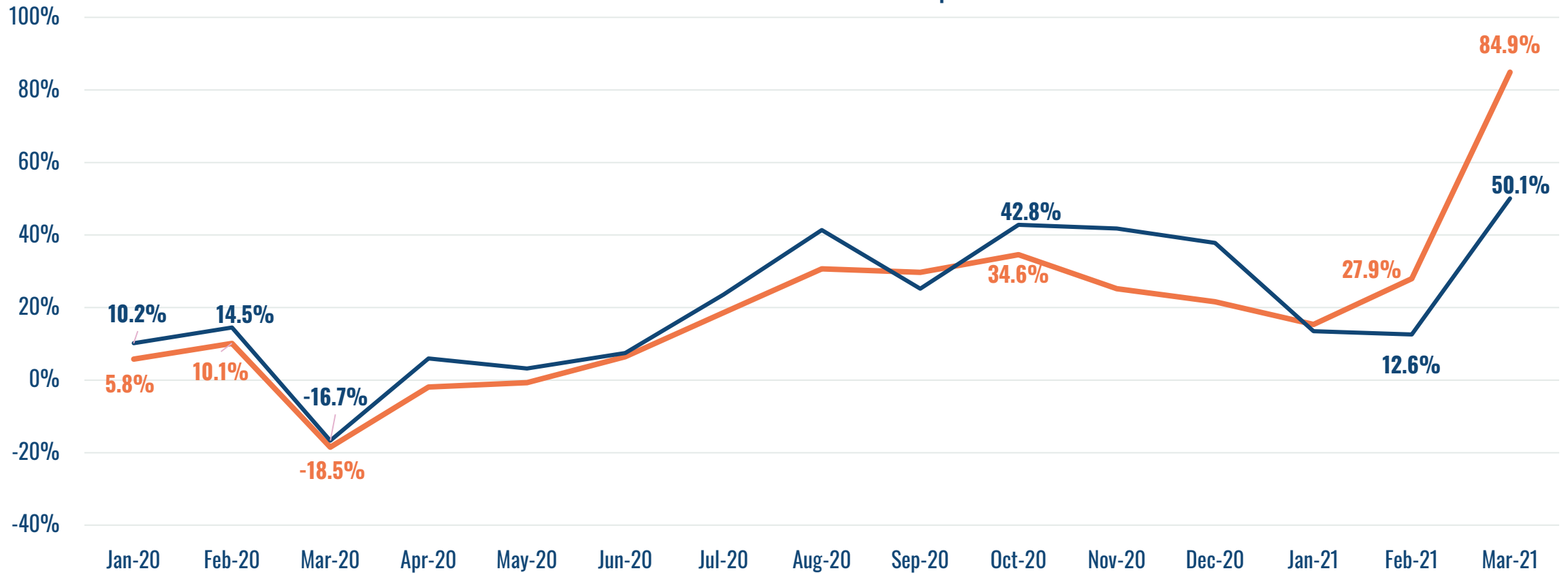
35.8%

25.2%

24.9%

18.9%

18.4%

9.2%

8.3%

11.8%

3.0%

4.1%

-0.4%

-2.5%

Jan-20 Feb-20 Mar-20 Apr-20 May-20 Jun-20 Jul-20 Aug-20 Sep-20 Oct-20 Nov-20 Dec-20 Jan-21 Feb-21 Mar-21

AirDNA listings include short-term rental properties listed by Airbnb and HomeAway.

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year

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NAICS Tourism Business Sales through February 2021
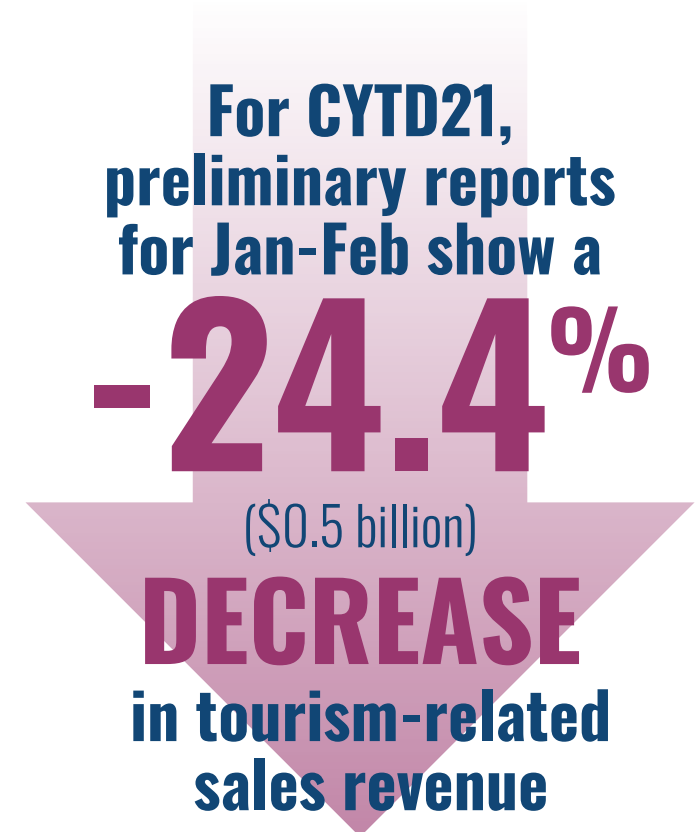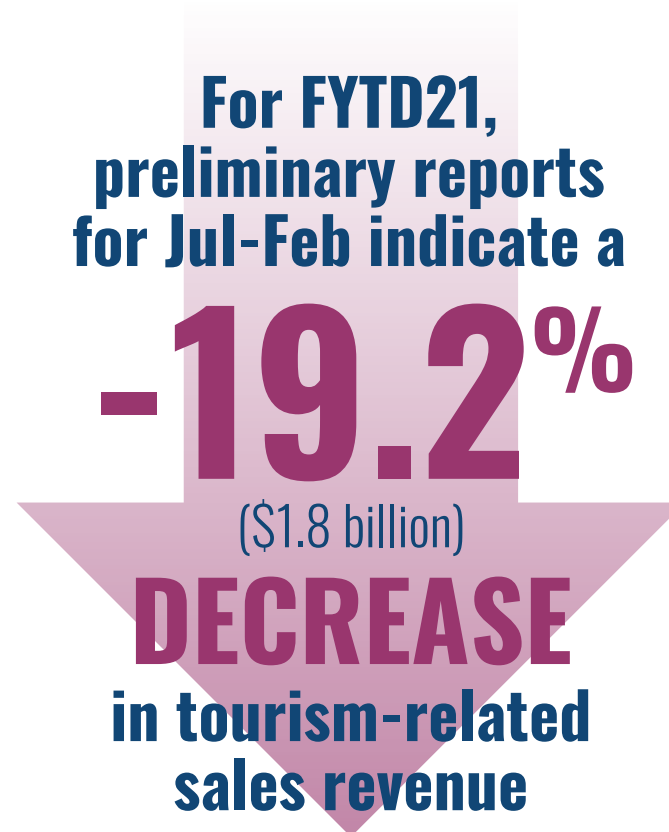
February 2021 saw a
-29.8%
($311.9 million)
DECREASE
in tourism-related sales revenue compared to February 2020

For FYTD21, preliminary reports for Jul-Feb indicate a
-19.2%
($1.8 billion)
DECREASE
in tourism-related sales revenue

For CYTD21, preliminary reports for Jan-Feb show a
-24.4%
($0.5 billion)
DECREASE
in tourism-related sales revenue

Source: Missouri Department of Revenue

Missouri Travel Barometer
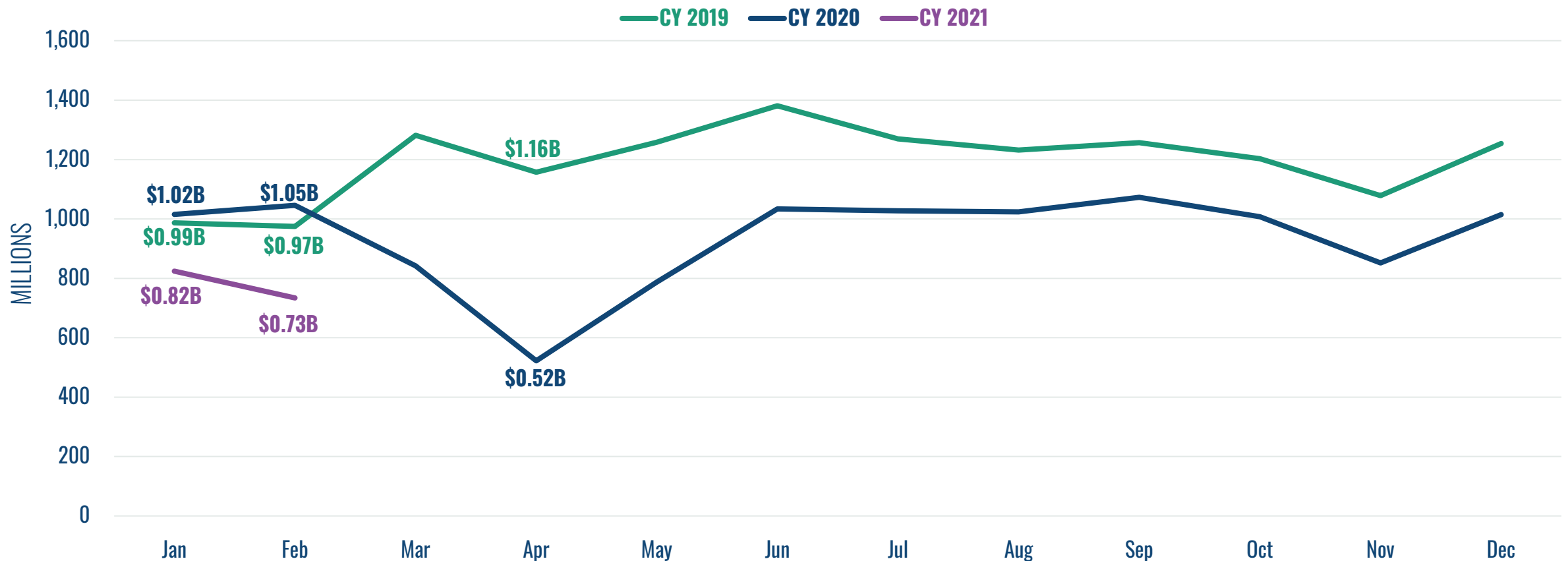
NAICS codes fluctuate by month and by season even in a normal year

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CY2020 Sales Revenue from Tourism-Related NAICS
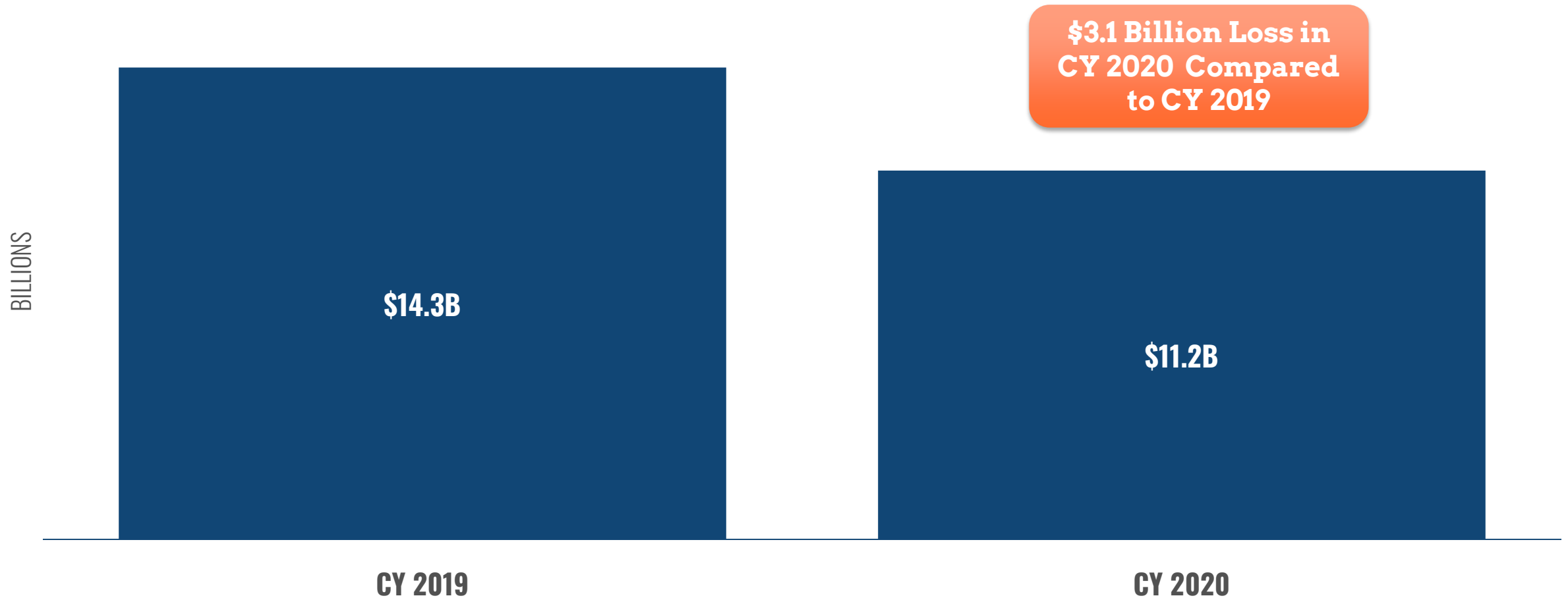
$3.1 Billion Loss in CY 2020 Compared to CY 2019

BILLIONS

$14.3B

$11.2B

CY 2019

CY 2020

Source: Missouri Department of Revenue

Missouri Travel Barometer

NAICS codes fluctuate by month and by season even in a normal year

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FY Sales Revenue from Tourism-Related NAICS

$13.8B

$14.2B

$12.5B

FY20 down $1.6B from FY19
FYTD21 down $1.3B from FYTD20

BILLIONS

FY18	FY19	FY20	FY21
$3.6	$3.8	$2.3	
$3.2	$3.2	$2.9	$2.9
$3.4	$3.4	$3.5	
$3.6	$3.7	$3.8	$3.1

$6.0B

■ Qtr 1   ■ Qtr 2   ■ Qtr 3   ■ Qtr 4
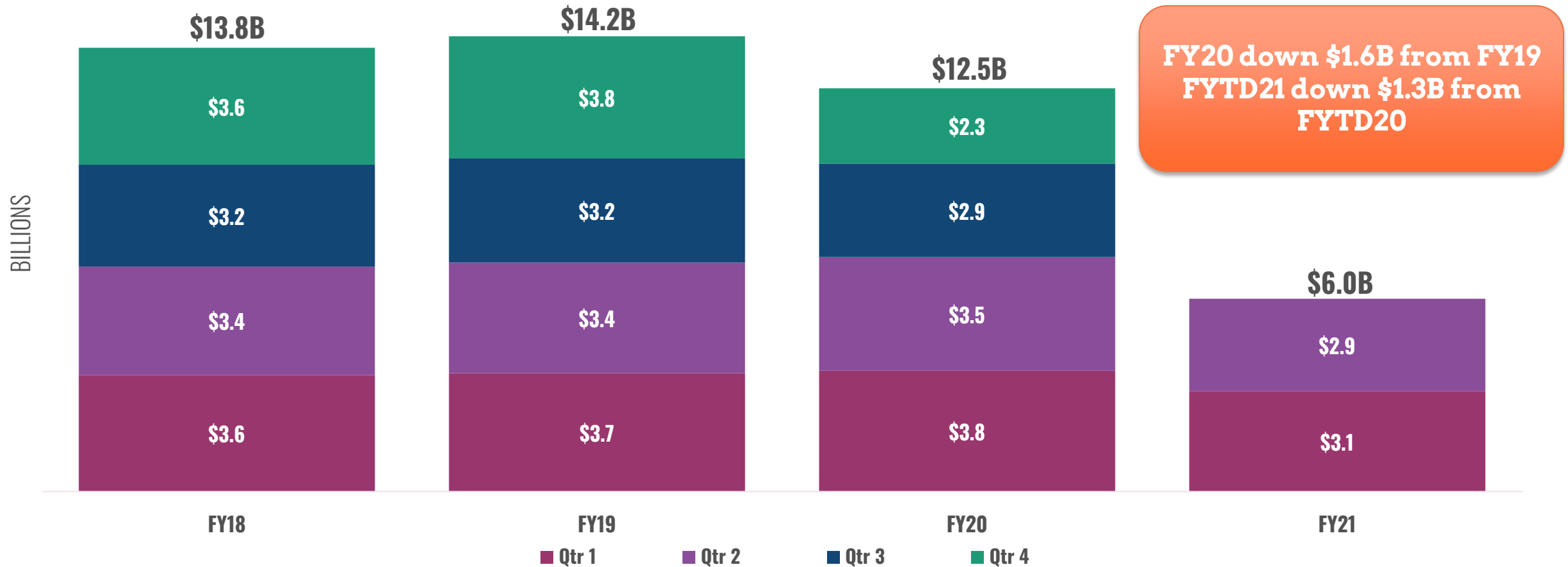
Source: Missouri Department of Revenue

Missouri Travel Barometer

Visits to the MDT website and marketing responses will always fluctuate due to seasonal traffic patterns

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Calendar Year Visits to VisitMO.com by Month

CYTD 2020	CYTD 2021	% of Change
430,637	686,888	+59.5%

April 2021 visits up 276.0% from April 2020

THOUSANDS

Legend: ■ 2019 ■ 2020 ■ 2021

JAN: 50, 113, 95
FEB: 58, 137, 81
MAR: 144, 102, 219
APR: 254, 78, 292
MAY: 222, 256
JUN: 510, 502
JUL: 245, 294
AUG: 195, 464
SEP: 104, 187
OCT: 114, 187
NOV: 88, 130
DEC: 129, 68

May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.

Missouri Travel Barometer

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns

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Fiscal Year Visits to VisitMO.com by Month

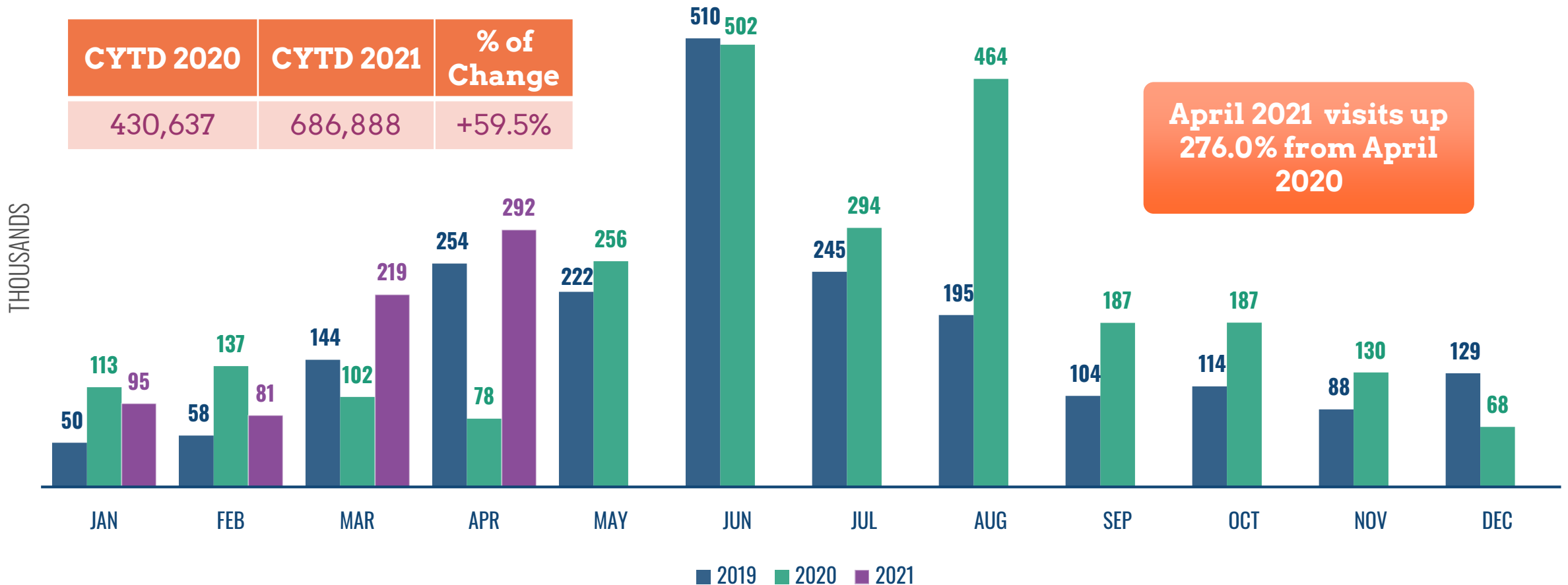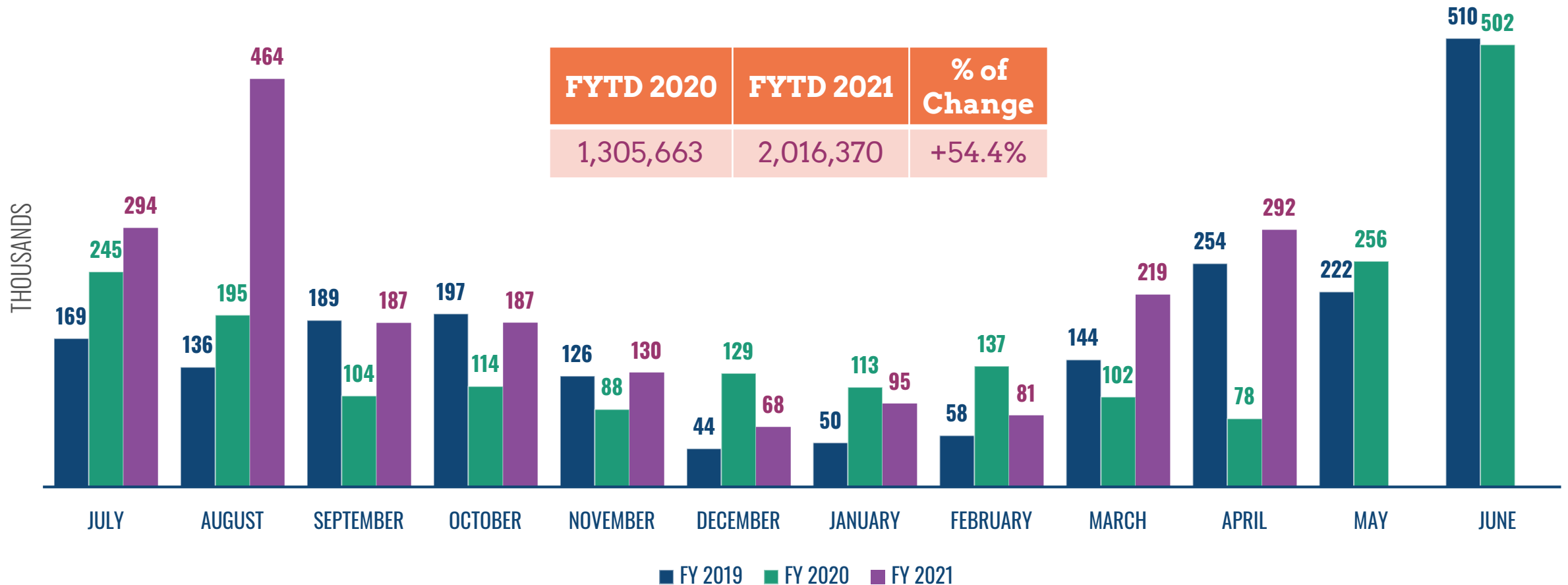| FYTD 2020	FYTD 2021	% of Change
1,305,663	2,016,370	+54.4%

THOUSANDS

Month	FY 2019	FY 2020	FY 2021
JULY	169	245	294
AUGUST	136	195	464
SEPTEMBER	189	104	187
OCTOBER	197	114	187
NOVEMBER	126	88	130
DECEMBER	44	129	68
JANUARY	50	113	95
FEBRUARY	58	137	81
MARCH	144	102	219
APRIL	254	78	292
MAY	222	256	
JUNE	510	502	

■ FY 2019 ■ FY 2020 ■ FY 2021

Source: Google Analytics

May 2018 was the first full month of the new VisitMO website. Covid-19 began early 2020.
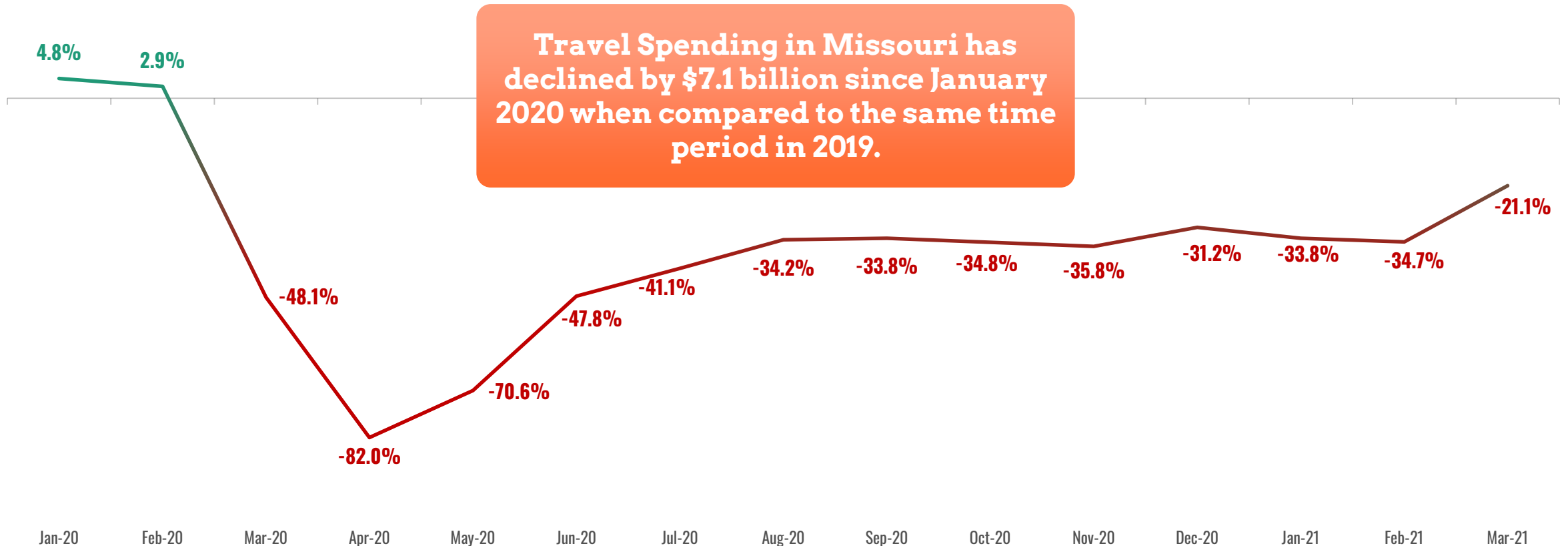
Missouri Travel Barometer

No significant marketing to drive website traffic or to solicit travel guide orders in the early part of 2020.

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Fulfillment of Travel Guide Orders from All Sources

CYTD 2020	CYTD 2021	% of Change
11,182	14,131	+26.4%

Legend: ■ 2020 ■ 2021

Month	2020	2021
Jan	2,640	3,175
Feb	3,695	2,956
Mar	2,992	4,289
Apr	1,855	3,711
May	8,707	
Jun	4,210	
Jul	3,190	
Aug	3,782	
Sep	2,699	
Oct	2,058	
Nov	1,233	
Dec	1,050	

Visits to the MDT website and marketing responses will always fluctuate due to seasonal travel patterns. Travel guide orders come through website orders, RSL leads and telephone calls.
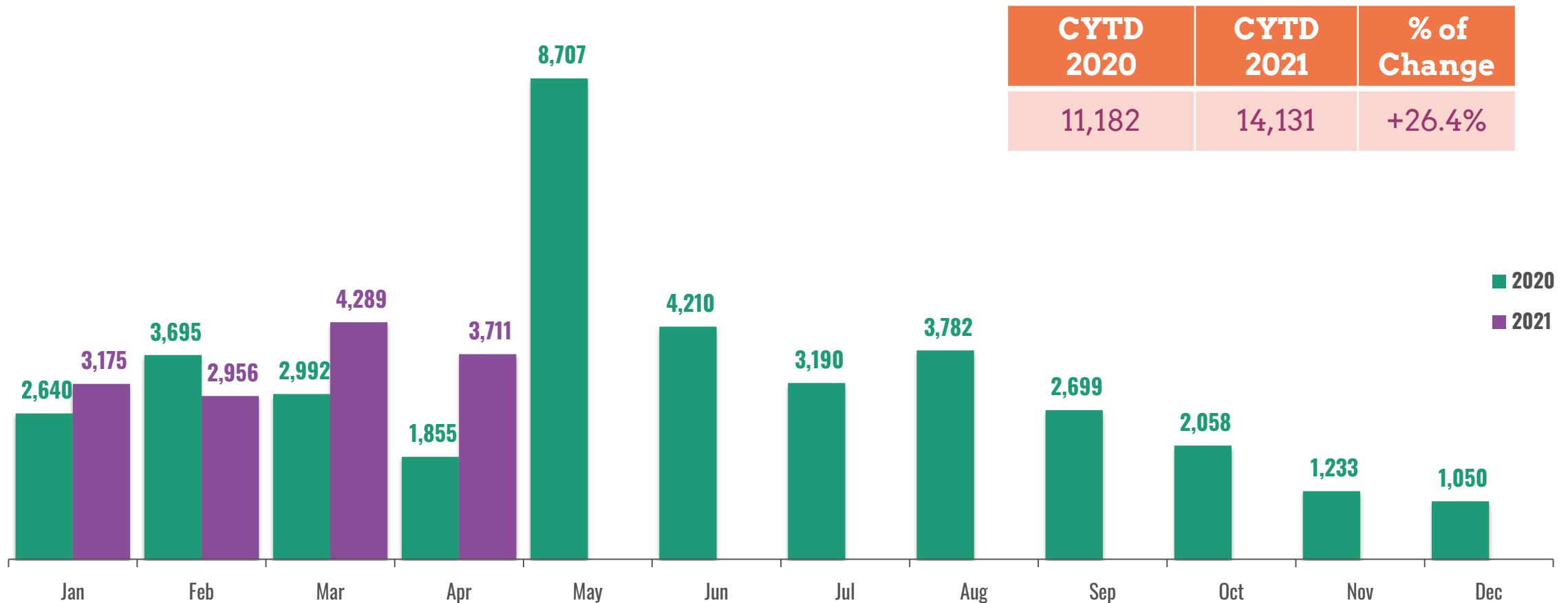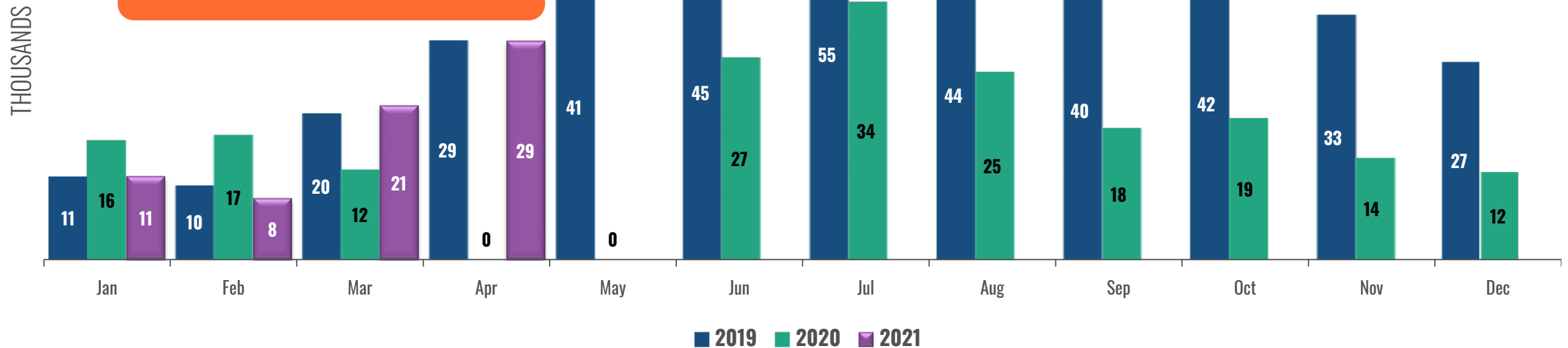
Missouri Travel Barometer

Welcome Center Visits: 2021 Calendar Year to Date through March

For CYTD 2021, the centers were up 54.2% for Jan – Apr 2021 compared to the same time a year earlier.

THOUSANDS

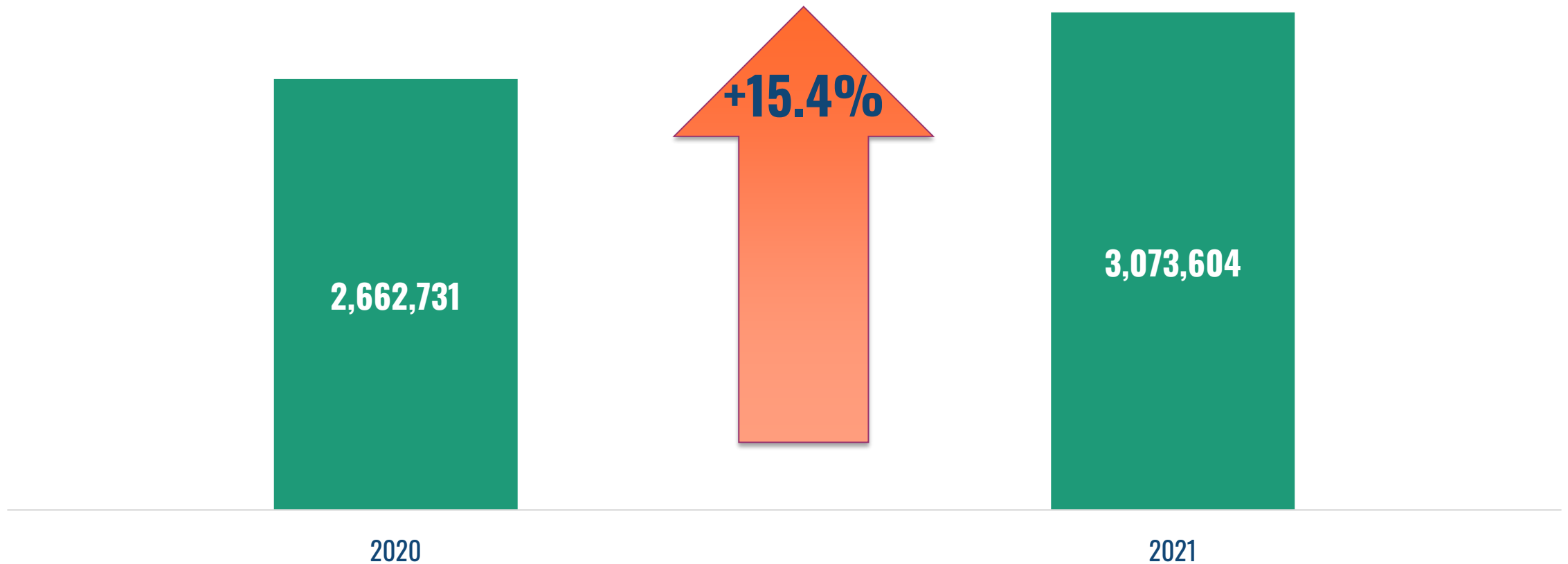| Month	2019	2020	2021
Jan	11	16	11
Feb	10	17	8
Mar	20	12	21
Apr	29	0	29
May	41	0	
Jun	45	27	
Jul	55	34	
Aug	44	25	
Sep	40	18	
Oct	42	19	
Nov	33	14	
Dec	27	12	

■ 2019   ■ 2020   ■ 2021

Notes: The Welcome Centers were closed March 18th – May 31st due to social distancing orders. The Centers started closing on weekends on 8/16/2020. (The centers were not open on weekends in 2019 from Jan – Mar). The Kansas City Welcome Center closed at the end of September, and the Hannibal and St. Louis Centers closed at the end of October. In November 2020, the centers switched to being open only Thursday – Monday. On 2/16/2021, the centers switched to being open only Tuesday – Saturday.
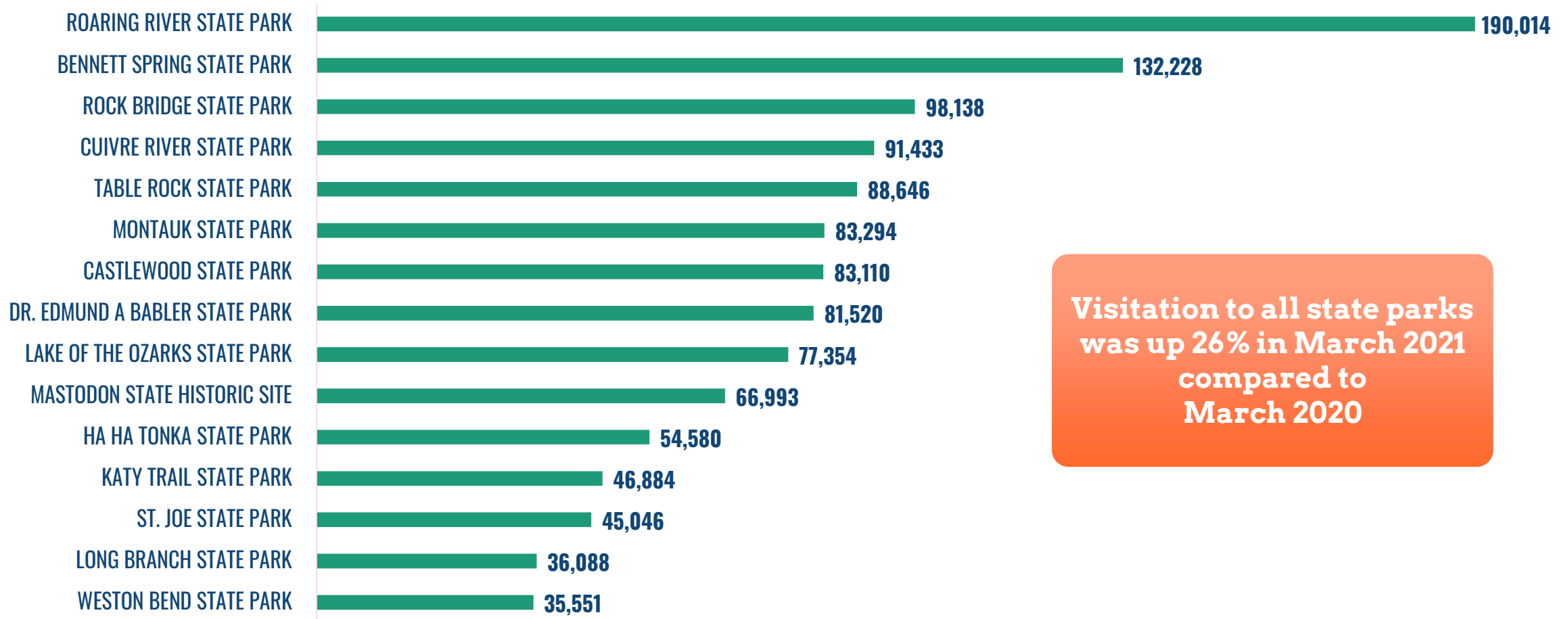
Missouri Travel Barometer

Most Visited Missouri State Parks during March 2021

Park	Visitors
ROARING RIVER STATE PARK	190,014
BENNETT SPRING STATE PARK	132,228
ROCK BRIDGE STATE PARK	98,138
CUIVRE RIVER STATE PARK	91,433
TABLE ROCK STATE PARK	88,646
MONTAUK STATE PARK	83,294
CASTLEWOOD STATE PARK	83,110
DR. EDMUND A BABLER STATE PARK	81,520
LAKE OF THE OZARKS STATE PARK	77,354
MASTODON STATE HISTORIC SITE	66,993
HA HA TONKA STATE PARK	54,580
KATY TRAIL STATE PARK	46,884
ST. JOE STATE PARK	45,046
LONG BRANCH STATE PARK	36,088
WESTON BEND STATE PARK	35,551

Visitation to all state parks was up 26% in March 2021 compared to March 2020

Source: Missouri State Parks

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Missouri Travel Barometer

Missouri National Parks Attendance

% of Change in Visits to Missouri National Parks
January - March 2021 Compared to 2020

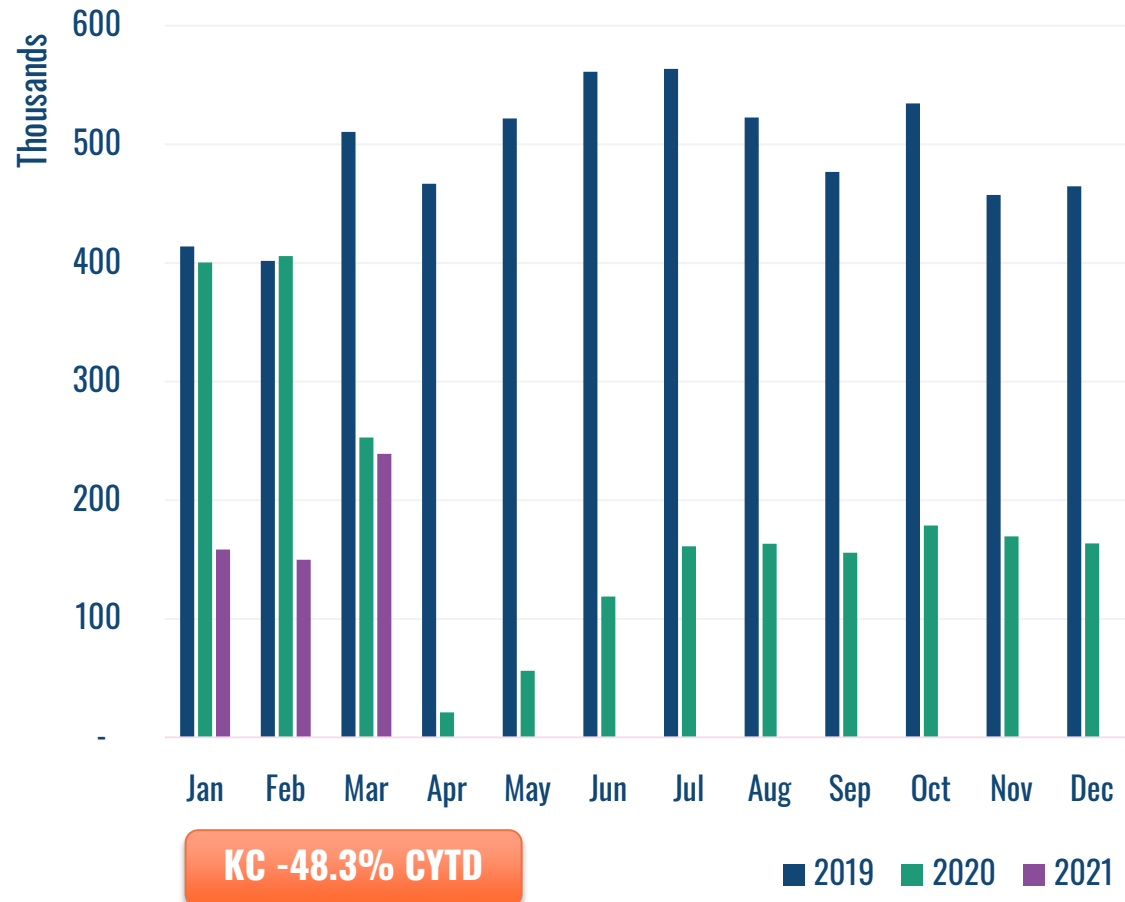|				
118.9%	**60.9%**	**-34.1%**	**-46.6%**	**-65.3%**
Ozark NSR (National Scenic Riverway)	Wilson's Creek NB (National Battlefield)	Gateway Arch NP (National Park)	George Washington Carver NM (National Monument)	Harry S Truman NHS (National Historic Site)
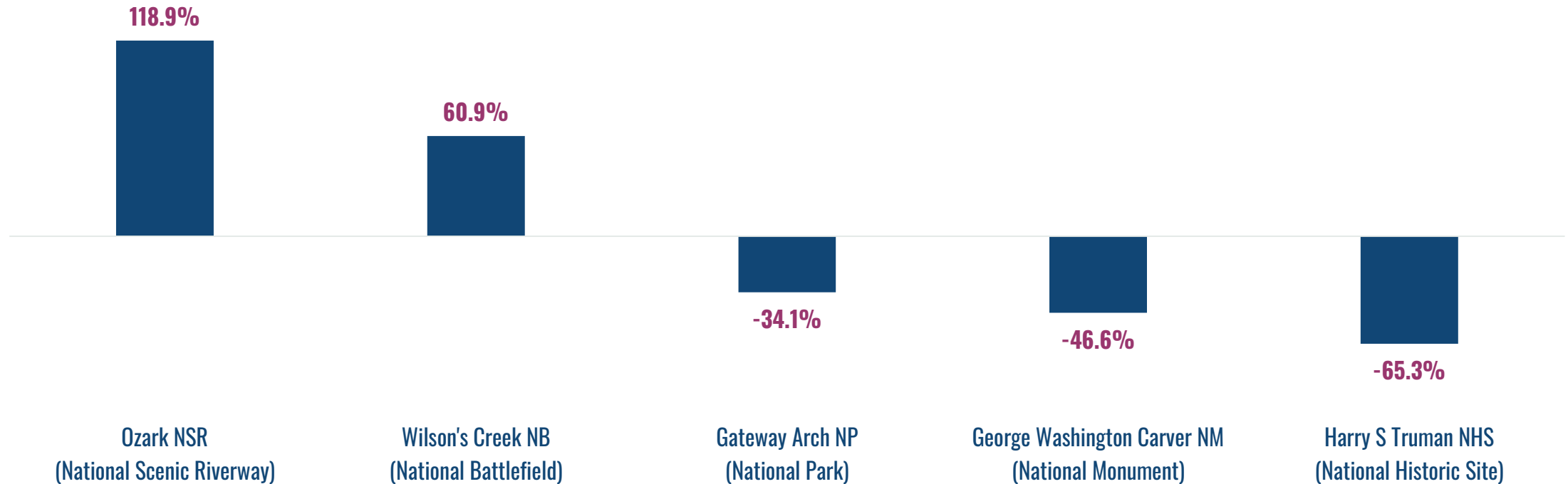
Notes: The visitor centers at the Wilson's Creek NB, the George Washington Carver NM and the Harry S Truman NHS closed in mid-March 2020 due to Covid-19 precautions. Truman's home was also closed, but the farm grounds remained open. At the Gateway Arch NP, the Old Courthouse closed, but Tram Rides to the top of the Arch resumed on September 1.
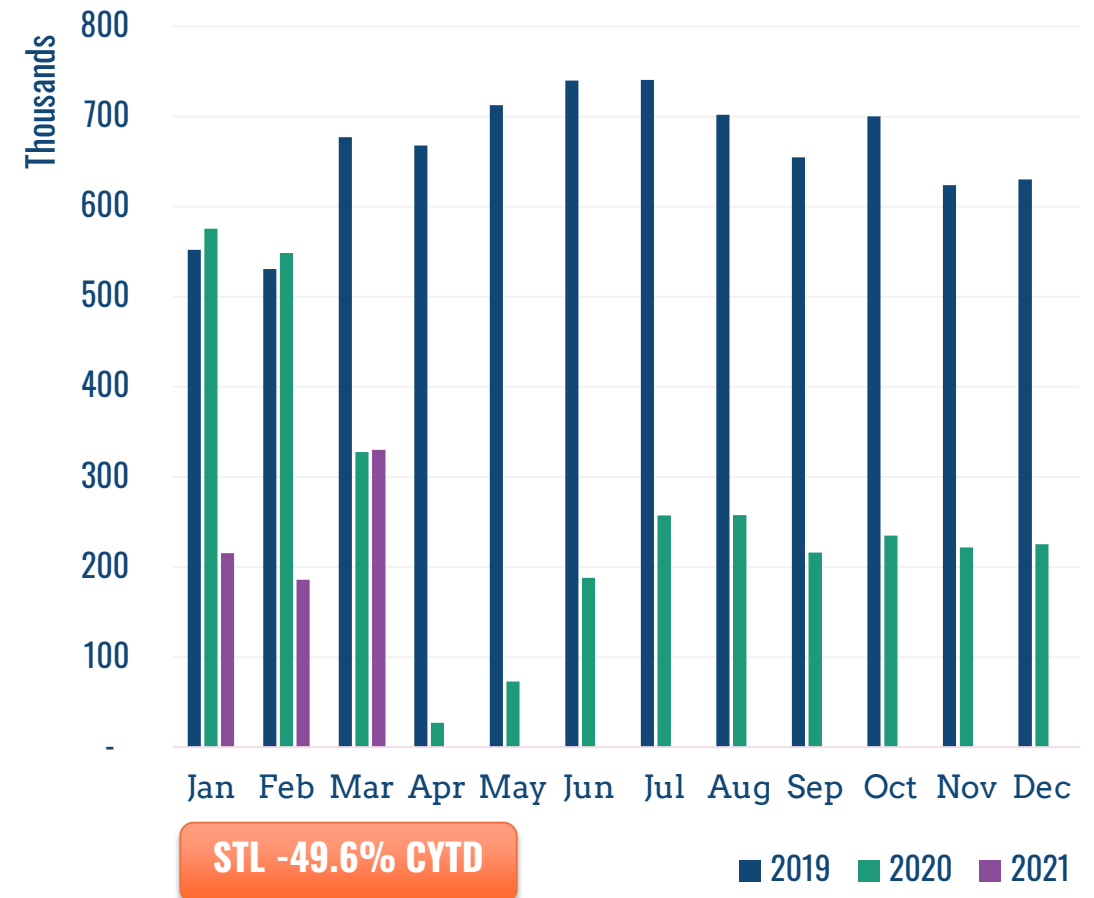
Missouri Travel Barometer

KC & STL Airport Deplanements

Kansas City

KC -48.3% CYTD

■ 2019 ■ 2020 ■ 2021

St. Louis

STL -49.6% CYTD

■ 2019 ■ 2020 ■ 2021

THANK YOU

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